Creating Workflows

The following steps allow you to create workflows in ECM. Workflows are used to assign the tasks and subtasks for a folder to individuals and groups. This job aid details how to create a new Workflow for a folder.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the Workflow tab.	SOEZH-105
2.	Select Change Workflow.	Change Workflow
3.	Select Add to create a new task for the new Workflow.	Add
4.	Complete the task-specific information, including Task (name), Assignee, Floating Days to Complete, Due Date, Approval, Notification, and Informational.	Assignee: Type: UserPosition: Group: Select Assignee
5.	Select Save & Return to save and add the task to the Workflow.	Save & Return
6.	Continue using Add to create new tasks to complete the Workflow.	Add
7.	Select Update & Return to save and implement the Workflow and return to the folder.	Update & Return

Add Existing Workflows: Workflows with Processing Codes

The following steps allow you to add an existing workflow to a folder in ECM. Workflows are used to assign the tasks and subtasks for a folder to individuals and groups. Workflows may be saved using a Processing Code (PC), which can then be assigned to Work Folders. Once a Workflow with a PC has been added to a folder, it can then be modified to meet any specific needs the folder requires.

Step	Action	Look For
1.	From the ECM Main Menu, select Create Folder to create a new folder.	Create Folder
2.	Complete the folder information, and then select Create Folder .	Create Folder
3.	Click the Processing Code select icon.	Processing Code:
4.	Highlight the Processing Code you wish to use for the folder.	Code Description Activid-Subject Reg. COSCO TID No COSCO
5.	Click Select.	Select
6.	Select Save to save the Folder and Workflow that has been added.	Save
7.	If you wish to make changes to the Workflow, select the Workflow tab.	SOEATTOS

Add Existing Workflows: Workflows from the Workflow Library

The following steps allow you to add an existing workflow to a folder in ECM. Workflows are used to assign the tasks and subtasks for a folder to individuals and groups. The Workflow Library provides many predefined Workflows, which can be assigned to Work Folders. This job aid details how to assign a Workflow to a Folder from the Workflow Library.

Note: This process may be performed by creating a new folder or using an existing one. For this job aid, an existing folder is used.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the Workflow tab.	<u> </u>
2.	Select Change Workflow.	Change Workflow
3.	Select Insert from Library to display the Select Workflow List screen.	Insert from Library
4.	Use the available filters to narrow the list of Workflows displayed, if desired.	August Oscologic Worldlow Lists for Selected Group:
5.	Highlight the desired Workflow from the Library list.	Workflow Lists for Selected Group: (### CESTATION From the Company of Cestation Company of Cestation Company of Cestation Ces
6.	Click Select List . The tasks associated with the Workflow are now added to the folder's Workflow.	Select List
7.	Select Update & Return to save the Workflow and return to the Folder.	Update & Return
8.	If you wish to make changes to the Workflow, select Workflow .	SOERT-108

Add Steps to a Workflow
The following steps allow you to add steps, or tasks, to an existing Workflow.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the Workflow tab.	
2.	Select Change Workflow.	Change Workflow
3.	Highlight a task within the Workflow that you wish to have the new task follow.	# Price Proceed Desides Supercolon Auryses 20cm Consisted Owner 1 Proposition Consisted Owner 1 Proposition Consisted Owner 1 Proposition 1 Propositio
4.	Select Insert . The Add/Change Task screen is displayed.	Insert
5.	To add a new task, select a task name from the Task drop-down menu or type a new task name in the text box.	Task:
6.	Click Select Assignee to assign an individual or group to complete the task.	Select Assignee
7.	Locate the desired individual or group using the List or Tree view, and then select Group/Position to assign a task assignee.	Groups Positions Main Group Level Down Level Up Find Group: Select Group/Position Aliased
8.	Complete the Days to Complete, Approval, Notification, and Informational options.	Floating Days to Complete:
9.	Select Save & Return to add the task to the Workflow.	Save & Return

tep	Action	Look For
10.	When all new tasks have been added to the Workflow, select Update & Return to return to the main folder. The updated workflow, with newly added tasks, is shown in the Workflow tab.	Update & Return

Adding Subflows to a Workflow
The following steps allow you to add subflows to an existing Workflow. Subflows are added to a task by the individual or group member who is assigned the task.

Step	Action	Look For
1.	From the ECM Inbox, highlight the task you wish to work on and add a subflow to.	3 EUROS NOI Generation Protes September (2001)200 (2001)200 (1-0.00) 4 EUROS NO (1-0.00) 5 EUROS NO (1-0.00) 5 EUROS (1-0
2.	Click Select Task.	Select Task
3.	Highlight the task you wish the subflow to follow, and then select Change Workflow .	Change Workflow
4.	Select Add/Change Subflow , and then select OK in the pop-up window. The task list that appears at the bottom of the screen that displays is the workspace for adding the subflow tasks.	Would you like to change the main workflow, or add/change the subflow for the active task? Change Workflow Add/Change Subflow OK Cancel
5.	Follow the same steps for adding a subflow that were used for adding tasks to a standard Workflow.	Subflow Assignments Subflow Return to Assignee Required? Yes No P Task Second Due Dato A Organization Assignee Required? Yes No Remarks: Workflow List Insert Sweet to Library Insert More Down Edit Details Remove Remove All Make Parallel
6.	Select Add to include the task in the subflow.	Add
7.	Select Save & Return to continue adding additional steps to the subflow.	Save & Return
8.	Select Update & Return to save the subflow and go back to the main folder. The Task List now displays the subflow tasks.	Update & Return

Making Tasks Parallel in a Workflow

The following steps allow you to make tasks parallel in an existing Workflow.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the Workflow tab.	SOL 1120S
2.	Select Change Workflow to open the Workflow Editor screen.	Change Workflow
3.	In the pop-up window, select Change Workflow and then OK .	Would you like to change the main workflow, or add/change the subflow for the active task? Change Workflow Add/Change Subflow OK Cancel
4.	Highlight the tasks you wish to make parallel. Hold CRTL and use the mouse to select each task.	Talk Recined Duc Date A Crypteration Assignee Status Completed Crypter
5.	Select Make Parallel . When the Parallel Tasks screen displays, verify the number of tasks shown are correct.	Make Parallel
6.	Select Change to complete making the tasks parallel in the Workflow. Note that the tasks are now assigned the same task number.	Change

Note: To make parallel tasks no longer parallel, highlight one of the parallel tasks and then select Move Up or Move Down, depending on the order you desire for the tasks.

Saving a Workflow to the Library

The following steps allow you to save a Workflow to the Workflow Library. New workflows or modified versions of existing workflows that are likely to be used again should be saved to the Workflow Library.

Step	Action	Look For
1.	From inside an ECM Work Folder, select the Workflow tab.	<u> </u>
2.	Select Change Workflow to open the Workflow Editor screen.	Change Workflow
3.	In the pop-up window, select Change Workflow and then OK to work with the main Workflow.	Would you like to change the main workflow, or add/change the subflow for the active task? Change Workflow Add/Change Subflow OK Cancel
4.	Select Save to Library from the Workflow List. The Save Workflow List screen is displayed.	Save to Library
5.	Complete the information options, including Enter New List Name, Select Existing List Name, List Name, List Type, Select Group, and Include Setup Folder Task, as appropriate.	Denter New List Name Select Existing List Name List Type: Group V
6.	Select OK to save the Workflow to the Workflow Library. When the Workflow Editor screen has displayed, ECM has saved the Workflow to the Workflow Library.	ОК

Completing a Task
The following steps allow you to mark a task as complete. When a task is complete, it must be marked complete before the next task in the Workflow can move forward.

Step	Action	Look For
1.	From the ECM Inbox, highlight and then click Select Task to open the task.	Select Task
2.	Select the task from the Task List.	# Took Received Countries A Graymotoco Assignment States Countries Organizate Process Countries A Graymotoco Assignment States
3.	Select Complete Task.	Complete Task
4.	Type any notes in the Remarks field on the Complete Task screen, if desired.	Remarks:
5.	Select Complete Task . Note: If the next task in the Workflow is assigned to you, a pop-up window will appear asking if you wish to select the next task to work on.	Complete Task